

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

RECEIVED
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PUBLIC RECORDS

2019 OCT -8 PM 4:30

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Atlantic Council

Travel date(s): 10/02/19-10/04/19

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input checked="" type="checkbox"/> Good Faith Estimate <input type="checkbox"/> Actual Amount	total: \$445 \$295 round trip airfare \$150 van transport	\$96/night Total: \$192	\$75	None

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate <input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attached agenda

10/08/19 Zahava Urecki Zahava Urecki
(Date) (Printed name of traveler) (Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

10/08/19
(Date)

[Signature]
(Signature of Supervising Senator/Officer)

Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Zahava Urecki

Name of Traveler: _____

Senate Committee on Energy and Natural Resources

Employing Office/Committee: _____

Atlantic Council

Private Sponsor(s) (list all): _____

October 2nd-4th, 2019

Travel date(s): _____

Note: If you plan to extend the trip for any reason you must notify the Committee.

Greenville-Spartanburg, South Carolina

Destination(s): _____

Explain how this trip is specifically connected to the traveler's official or representational duties:

Zahava handles the vehicle technologies, advanced manufacturing, and workforce development portfolio for the Energy and Natural Resources Committee. Since this trip is focused on electric vehicles and electric mobility and will also feature visits to manufacturing facilities that make electric vehicles and buses this will be a unique opportunity to learn first hand about the manufacturing processes for these kinds of vehicles and learn about the workforce behind them.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

09/26/19
(Date)

Zahava Urecki
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

Senator Joe Manchin III

Zahava Urecki

I, _____ hereby authorize _____
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

09/20/19
(Date)

Joe Manchin III
(Signature of Supervising Senator/Officer)



Ms. Zahava Urecki
Professional Staff Member
Senate Committee on Energy and Natural Resources
SD-304 Dirksen Senate Office Building
Washington, DC 20510

August 26, 2019

Dear Ms. Urecki,

It is our pleasure to invite you to join a congressional staff delegation trip to South Carolina to study transportation innovation and leadership in clean and efficient vehicles on October 3 (including flights, October 2-4). The trip will focus on South Carolina's leadership in advanced transportation and energy, particularly the manufacturing of electric and highly efficient vehicles in the Greenville/Spartanburg area, a major hub of the US automotive industry. The trip will also examine the role that transatlantic trade and investment play in enabling and sustaining this technological and manufacturing leadership.

The delegation will include staff from relevant congressional committees and caucuses, as well as key staff from Member offices for whom these issues are of particular relevance.

You, along with your colleagues on the Senate Committee on Energy and Natural Resources, play an instrumental role in shaping American transport, infrastructure, and energy policy. We believe this trip would provide you with an opportunity to learn more about the impressive advancements underway in energy and mobility and to see some of the key technologies and facilities underpinning these advancements firsthand.

Planned meetings and site visits include BMW, Proterra, the Clemson University International Center for Automotive Research (CU-iCAR), and other local business and economic development leaders.

To confirm your participation, or for further information and any questions you may have, please contact Zachary Strauss at ZStrauss@atlanticcouncil.org. We very much hope to see you in October.

Sincerely,

A handwritten signature in black ink, appearing to read "D. Livingston".

David Livingston
Deputy Director, Climate and Advanced Energy
Atlantic Council

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The Atlantic Council
2. Description of the trip: Site visits and briefings with key stakeholders within the electric mobility and advanced transportation fields based in South Carolina
3. Dates of travel: October 2-4, 2019
4. Place of travel: Greenville-Spartanburg, South Carolina
5. Name and title of Senate invitees: See Addendum #2
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - ~~OR~~
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
~~AND~~
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - ~~AND~~
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. USE ONLY IF YOU CHECKED QUESTION 6(B)

I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

OR

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

OR

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. USE ONLY IF YOU CHECKED QUESTION 9(B)

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

- 12. Briefly describe the role of each sponsor in organizing and conducting the trip:**

Please See Addendum #1

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

Please See Addendum #1

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

Over the past decade, the Atlantic Council has sponsored various trips across the world for relevant

polymakers and congressional staff. For example, in April 2019 and October 2018, the Atlantic Council

sponsored congressional delegations to the United Arab Emirates focused on clean energy.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Please see Addendum #1

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	Total: \$445 \$295 Round-trip Airfare	\$96/night Total: \$192	\$75	None
<input type="checkbox"/> Actual Amounts	\$150 Van Transport			

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip includes an event that is organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

The Greenville-Spartanburg area (SC) is a central hub for the automotive manufacturing sector and for advanced transportation innovations, and has attracted significant domestic and international investment.

19. Name and location of hotel or other lodging facility:

Embassy Suites by Hilton, Greenville Golf Resort

670 Verdae Boulevard, Greenville, SC 29607

20. Reason(s) for selecting hotel or other lodging facility:

The hotel offers a competitive rate in line with per diem lodging rates and is located near site venues and restaurants.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Meal estimates are below official M&I rate. Lodging estimates are equal to per diem rates.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Round-trip economy tickets from Washington, DC to Greenville, South Carolina.

Fifteen-passenger van for on-site transportation.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor:

Julie Varghese

Name and Title: Julie Varghese, Chief Administrative Officer

Name of Organization: The Atlantic Council

Address: 1030 15th Street NW, 12th Floor, Washington, DC 20005

Telephone Number: 202.778.4952

Fax Number: 202.463.7241

E-mail Address: JVarghese@AtlanticCouncil.org

Addendum:

12. The Atlantic Council is the sole organizer and implementer of this trip, and is solely responsible for the agenda, the selection of sites and guest speakers, and the execution of the trip itself. The Atlantic Council will pay for the traveler's airfare, hotel accommodations, meals, and transportation, pursuant to relevant Ethics guidelines. The funds used to cover these expenses derive from grant support provided by the MacArthur Foundation to the Atlantic Council Global Energy Center for the purpose of informing and educating key stakeholder groups on the latest trends in clean energy, clean transport, and climate change. The MacArthur Foundation does not include any specific provision for any specific Congressional staff delegations as part of this broad support, and the decision to organize this staff delegation is at the discretion of the Atlantic Council as part of its work. The MacArthur Foundation provides only broad funds for the Atlantic Council's research and education work related to clean energy, clean transport, and climate, and has played no role in the organization or execution of the trip.

13. The Atlantic Council is a registered 501(c)(3) nonprofit organization and promotes constructive US leadership and engagement in international affairs based on the central role of the Atlantic community in meeting current international challenges. The Atlantic Council's Global Energy Center specifically promotes energy security by working alongside government, industry, civil society, and public stakeholders to devise pragmatic solutions to the geopolitical, sustainability, and economic challenges of the changing global energy landscape.

Consistent with its mission, the Atlantic Council wishes to provide an educational tour and briefings for congressional staff that highlight leadership in electric mobility and clean transport technologies at key institutions (both academic and private sector) across the Greenville-Spartanburg area, with a focus on how this leadership contributes to energy security, economic competitiveness, and local development. For example, Proterra, the largest electric bus manufacturer in the United States, is based in the target geographic area, where it provides it supports the local economy and labor force and competes actively with other international electric bus manufacturers for market share in this rapidly growing industry. The trip will provide a unique opportunity to see this work first-hand, and hear from leaders about the role of constructive state-federal engagement in developing commercially viable, international competitive clean energy technologies.

15. Through its diverse networks, the Atlantic Council builds broad constituencies to support constructive US leadership and policies. The Global Energy Center, along with the other ten program and centers within the Atlantic Council, publishes analyses, convenes conferences among current and/or future leaders, and contributes to the public debate in order to integrate the views of relevant individuals from a variety of backgrounds.



GLOBAL ENERGY CENTER

Agenda:

South Carolina Advanced Energy & Transport Staff Delegation Trip, October 2-4, 2019

Wednesday, October 2, 2019

1:44 p.m.

Depart for Greenville

Location: Washington National Airport (DCA)

Flight number: AA 5473

Airline: American Airlines

3:30 p.m.

Arrive in Greenville

4:15 p.m.

Drive to Hotel

Transit Time: 25 minutes

Transportation: Van

4:40 p.m.

Hotel Check-in and Settle in

Hotel: Embassy Suites by Hilton Greenville Golf Resort

Address: 670 Verdae Boulevard, Greenville, South Carolina 29607

6:00 p.m.

Drive Downtown for Dinner

Transit Time: 20 Minutes

Transportation: Van

6:30 p.m.

Welcome Dinner and Briefings

Venue: The Nose Dive

Address: 116 S Main St, Greenville, SC 29601

Briefers:

Mr. David Livingston, Deputy Director for Climate & Advanced Energy, Atlantic Council

Mr. Vincenc Pearson, Corporate Counsel, DAA Draexlmaier Automotive of America LLC

Invited Guests:

Mr. Sam Moses, Partner, Parker Poe

Mr. David Lewis, President and Owner, Context Design Group

Mr. Steve Cooper, Managing Partner, Rödl & Partner USA

Format: Dinner briefing and discussion around the table

Staffers will receive an overview of South Carolina and its economy, serving to create a foundational structure of the broader dynamics underpinning many of the organizations and themes that will be discussed on the trip. A particular focus of the discussion will be the relative density of activity related to advanced



Staffers will debrief the BMW tour, receive further information on the impact of advanced automotive manufacturing on the broader industry ecosystem of the Spartanburg area, and will receive further information related to the electric mobility theme to be explored further at the following CU-iCAR and Proterra visits.

1:30 – 3:00 p.m.

BMW Factory Tour and Briefing

Address:

BMW Manufacturing
1400 Highway 101 S
Greer, SC 29651-6731

Briefers:

Mr. Max Metcalf, Manager, Government and Community Relations, BMW Manufacturing Company, LLC

Format: Conference room briefing and guided tour.

This BMW manufacturing plant, located in Greer, South Carolina, is the first full BMW manufacturing plant outside Germany and the first production facility in the US, supporting around 11,000 jobs in South Carolina and beyond. BMW manufacturing is committed to operational sustainability and has found innovative ways to meet their quality and consistency standards while minimizing their carbon footprint. This BMW facility produces hybrid electric vehicles onsite and is a part of the company's ambitions to expand its e-mobility offerings. We will also be learning about the manufacturing facility's efficiency and sustainability initiatives, including a water conservation program that saves 9.5 million gallons each year, a solid waste recycling program that curbs the need for landfill, in addition to other green efforts. From 2006-2018, per vehicle shipped, the Greenville BMW plant has reduced energy consumption and landfill waste generation by 61% and 85% respectively. The manufacturing plant has also engineered a successful landfill methane "Gas to Energy" program that supplies 50% of the plant's total energy requirements.

3:00 p.m.

Depart for Proterra

Transit time: 30 mins

Transportation: Van

3:30 - 5:30 p.m.

Proterra Factory Tour and Briefing

Address:

Proterra, Inc.
1 Whitlee Ct
Greenville, SC 29607

Briefers:

Mr. Kent Leacock, Senior Director, Government Relations & Public Policy, Proterra

Mr. Eric McCarthy, Senior Vice President, Government Relations, Public Policy, and Legal Affairs, Proterra

Format: Conference room briefing, guided tour, and bus ride

Headquartered in Greenville, South Carolina, Proterra is the largest electric bus manufacturer in the United States. Since operations began in 2004, Proterra has become a leader in the zero-emission electric transit market, selling over 700 vehicles to 90 local communities across 41 US states and Canadian provinces. Beyond city streets, Proterra vehicles are currently deployed around the country on university campuses, at airports, around national parks, etc. While based in South Carolina, Proterra also supports and R & D laboratory and satellite manufacturing sites in California. As a company goal, Proterra seeks to lead the rapid transformation of heavy-duty US transportation to 100% electric fleets.

5:30 p.m.

Depart for Hotel
Transit time: 10 mins
Transportation: Van

6:20 p.m.

Depart for Dinner Venue
Transit time: 20 mins
Transportation: Van

7:00 - 9:00 p.m.

Dinner Briefings with Local Business & Government Leaders
Venue: Larkins on the River
Address: 318 S Main St, Greenville, SC 29601

Briefers:

Rep. William Timmons, US Representative, 4th District, South Carolina
Mr. James Keel, Director of Public Transportation, Greenlink (Greenville Transit Authority)
Mr. Michael Rowand, Director, Technology Development, Duke Energy

Invited Guests:

Mr. Kent Leacock, Senior Director, Government Relations & Public Policy, Proterra
Mr. Max Metcalf, Manager, Government and Community Relations, BMW Manufacturing Company, LLC

Format: Dinner briefing and discussion around the table

Staffers will synthesize their observations and experiences from the day, putting their site visits into a broader context. Staffers will also hear from key local leaders, including congressional Representative Timmons, who represents the region being visited and can provide additional insights into local economic and industry trends, as well as James Keel, the Interim Director of Greenlink, which has deployed Proterra electric buses and can provide insight into how electric transport is impacting operational, environmental, and financial dynamics of the Greenville Transit Authority.

9:00 p.m.

Depart for Hotel
Transit Time: 20 mins
Transportation: Van

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Friday, October 4

10:46 a.m.

Depart Greenville

Location: Greenville-Spartanburg Airport (GSP)

Flight number: AA 4736

Airline: American Airlines

12:21 p.m.

Arrive in Washington, DC

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Senate Staffers

Honorific	First Name	Last Name	Title	Affiliation					
Ms.	Jessi	Axe	Professional Staff Member	Senate Committee on Appropriations: Subcommittee THUD					
Mr.	Garrett	Boyle	Legislative Director	Office of Senator Murkowski					
Mr.	Chester	Carson	Senior Professional Staff Member	Senate Committee on Energy and Natural Resources					
Mr.	Lane	Dickson	Professional Staff Member	Senate Committee on Energy and Natural Resources					
Ms.	Clare	Doherty	Clerk	Senate Committee on Appropriations: Subcommittee THUD					
Ms.	Danielle	Gibbs	Upstate Regional Director	Office of Senator Scott, Upstate Office					
Mr.	Aaron	Goldner	Energy and Environment Counsel	Office of Senator Whitehouse					
Mr.	Scott	Graber	Legislative Assistant and Counsel	Office of Senator Graham					
Ms.	Eva	Gutierrez	Legislative Correspondent	Office of Senator Shaheen					
Mr.	Christopher	Hanson	Professional Staff Member	Senate Committee on Appropriations: Energy and Water Development					
Ms.	Dabney	Hegg	Clerk	Senate Committee on Appropriations: Subcommittee THUD					
Dr.	Ariel	Marshall	Legislative Director	Office of Senator Shaheen					
Mr.	Rajat	Mathur	Professional Staff Member	Senate Committee on Appropriations: Subcommittee THUD					
Ms.	Kayla	McMurry	Legislative Assistant	Office of Senator Collins					
Ms.	Anna	Newton	Legislative Correspondent	Office of Senator Graham, Upstate Office					
Ms.	Angela	Omer	Upstate Regional Director	Office of Senator Alexander					
Mr.	Tyler	Owens	Clerk	Senate Committee on Appropriations: Energy and Water Development					
Mr.	Bryan	Petit	Senior Professional Staff Member	Senate Committee on Energy and Natural Resources					
Mr.	Nathan	Robinson	Professional Staff Member	Senate Committee on Appropriations: Subcommittee THUD					
Mr.	Rishi	Sahgal	Legislative Assistant	Office of Senator Feinstein					
Mr.	Meyer	Seligman	Professional Staff Member	Senate Committee On Appropriations: Subcommittee on Energy and Water Development					
Mr.	Rory	Stanley	Professional Staff Member	Senate Committee on Energy and Natural Resources					
Ms.	Zahava	Urecki	Professional Staff Member	Senate Committee on Energy and Natural Resources					
Ms.	Hannah	Vogel	Legislative Aide	Office of Senator Markey					
Mr.	Jim	Warren	Deputy Legislative Assistant	Office of Senator Scott					

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